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ABSTRACT

This study focuses on the planning necessary to support library instruction for an online public access catalog in an academic library. The installation of an online catalog is viewed as an opportunity for librarians to teach effective use of the library catalog. The project report consists of a review of the literature pertaining to the implementation of an online catalog and the education of users, results of a survey of 20 institutions that have implemented online catalogs, and recommendations and a checklist for implementation of an online catalog instruction program. The recommendations cover primary tasks (timetables, budgets, strategies for library instruction, library personnel, and cooperative efforts); library instruction materials (content and format); equipment (library instruction equipment and other concerns); and public relations (university-wide and in the library). Appendices include a timetable/checklist; a list of learning objectives for online catalog education developed by a Northwestern University (Illinois) study; a fact sheet on the Automated Library Information System (ALIS) at University of Wisconsin-Stout; a reprint of an article entitled "Designing Point-Of-Use Instruction for the Online Catalog" (Linda Wilson); the survey questionnaire; and a list of institutions from which sample library instruction materials are available. A four-page bibliography is included. (THC)

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NEW CATALOG, SAME OLD USER

RECOMMENDATIONS FOR TEACHING THE ONLINE CATALOG

Barbara J. Fahey
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Supported by a Curriculum Development Grant

University of Wisconsin-Oshkosh

1985

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INTRODUCTION:

Since the 1960's the UW-Oshkosh library has been moving toward an Online Public Access Catalog. Even before self contained turnkey library automation systems were available, the LLR administration had initiated the formidable task of putting the library holdings in machine readable form. When practical online circulation systems became available in the mid 70's, the library converted its boxes of punch cards to magnetic tape and had the system up and running in what was probably record time. The system has worked well ever since--maintaining circulation records and providing management statistics. Recently the library has begun using the same computer hardware plus additional software to handle acquisitions and bookkeeping. The complete upgrading of the library's machine readable records--to duplicate all the information found in the card catalog, was completed in the Summer of 1985. The UW System has allocated over $500,000 to replace the current limited system with a new system including an online catalog.

The reasons for converting to an online catalog are many. The advantages to the library user and to library operation are significant. Perhaps the most significant advantage is the opportunity to educate the library user. Based on pretests done in LLR's library instruction program--a large number of students don't really understand how to use the card catalog. Based on observations from the reference desk--they don't want to admit it by asking for help. As a result, much information available in the card catalog is unused. Many books go unfound: expensive cataloging and expensive books--going to waste. This phenomenon has probably gone on since the card catalog came into common use in the last century. With the introduction of the online catalog the librarians have another chance at educating the library user to search strategies in finding what the library has which matches the user's needs. This may also be an opportunity to publicize the library, to promote additional use, and to further integrate library skills into the curriculum by turning faculty onto the library. It may also be possible to use the new system as a selling point for the University.

To exploit this rare opportunity effectively requires planning. The library faculty and staff must be ready to meet the challenge of educating the library users. There are two stages to consider: first, the users must be aware of what an online catalog is and, more importantly, how it will benefit them; second, they must learn how to use the specific system chosen by LLR. Both of these stages require extensive planning if they are to proceed smoothly. What kinds of activities are successful? What pitfalls can be expected and avoided (or at least minimized?) What kind of literature, handouts, publicity, etc. is necessary? What kind of timetable is practical? How

much money must be budgeted to support the education process? A well thought out 'plan of attack' will answer these questions and provide the guidance necessary for an easy transition for the LLR users from the card catalog to an online catalog.

PROJECT DESCRIPTION:

1. Review the literature pertaining to the implementation of an online catalog and the education of users.

2. Consult with other institutions that have implemented an online catalog.

3. Report on the results of numbers 1 and 2.

4. Make recommendations and prepare a checklist for implementation of an Online Catalog Instruction Program.

REVIEW OF THE LITERATURE

Online catalogs have been around long enough so that a fair amount has been written about them. An ERIC search produced over fifty hits on the subject of online catalog instruction, guides, etc. Additional articles and documents were obtained through bibliographies and reading. Reference to selected notes taken by D. Campbell at the Fall 1983 University of Iowa Online Public Access Conference also proved of value. The scope of the literature ranges from useful, "how I did it" articles on single libraries to extensive multi library studies by CLR and OCLC. The tone and findings of most of the articles are positive and heartening. Online catalogs are liked by the majority of those participating in surveys, including nonusers. And while the "event" of going online may increase library visibility and provide an opportunity to improve the catalog searching skills, students and faculty are not interested unless they have an assignment or research project. The amount of library instruction recommended varies considerably from study to study. Baker and Nielsen's article provides a good discussion of this dichotomy.[1] Some believe that increased user friendliness of the online systems rather than user training should be the goal. Other studies conclude that a variety of instruction on various levels is necessary for users to be able to use the catalog adequately. All conclude that there are two variables that must be considered.

The first variable to consider is the sophistication of the system. The computer catalog offers some complex search capabilities not readily apparent to the user. Arret's article warns against making the online catalog too easy, lulling the user into a false sense of security.[2] The card catalog is among the most difficult library tools to teach and use well. At least, however, it has physical presence. Through trial and error a persistent user can rummage through it and gain some idea of what is in it and how it is organized. Their mental image of the card catalog may have some fallacies as to materials it includes and excludes, how the cards are filed, what information is given on the card, etc., but through exposure over the years they will have constructed their own mental image or model of the card catalog. Baker and Nielsen see the need for providing a

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[1]Baker, Betsy, and Nielson, Brian. "Educating the Online Catalog User: Experiences and Plans at Northwestern University Library", Research Strategies, Vol.1, No.4, (Fall 1983), 155.

[2]Arret, Linda. "Can online catalogs be too easy?" American Libraries, February, 1985, pp.118-120.

comparable mental model of the online catalog for the user.[3] Because of the sophistication of most systems, this objective would require formal library instruction.

The second important variable to consider is the user's level of skill and understanding in card catalogs and computers. Pre and Post tests in our LLR instruction program indicate a need to teach students the card catalog. Students appear very receptive to using the one public access terminal available.

Unlike the students, the nonlibrary faculty's level of skill and understanding of the card catalog and computers is an unknown at the University of Wisconsin-Oshkosh. The literature shows that there are a variety of reasons for making a special effort to survey this group in planning library instruction for the online catalog. Students generally believe what their professor tells them about the library. "I'll ask my professor, she'll know." is a very common response to any difficulties encountered by the reference librarian in locating material for a student. Student's motivation toward libraries and library instruction appears to be very highly influenced by the professor. Research indicates that older people are not as receptive to online catalogs and chronologically, professors fall into this group.[4] Other generalizations of older users and professors gleaned from reading, observation, and conference notes indicate that they don't wish to appear ignorant, they prefer being taught in private, and by their peers (nonlibrary faculty). Because the non-library faculty is such an influential group vis-a-vis their students, special efforts in surveying their catalog use habits and in planning for their introduction to the online catalog is necessary.

Research also indicates that students and faculty will search the catalog in different ways (students by subject and faculty by known item) and this must be taken into account in library instruction.

PATRON ATTITUDES:

Moore found in a study of four universities with online catalogs that user reaction was overwhelmingly favorable compared to

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[3]Nielsen, Brian. Educating the Online Catalog User: A Model for Instructional Deveopment and Evaluation, Northwestern University Library, Evanston, IL., January 4, 1985, p. 32.

[4]Markey, Karen. "Subject Searching in Library Catalogs: Before and After the Introduction of Online Catalogs", OCLC Library, Information, and Computer Science Series, 1984, p.7.

manual catalogs.[5] She also found that patrons learned to use online catalogs with minimun instruction and with as much success as conventional catalogs. Markey found that over 80% of users and nonusers had favorable attitudes toward OPAC.[6] The CLR nationwide survey, Using Online Catalogs, found that both users and nonusers had a positive attitude and that most nonusers do anticipate ease of learning the online catalog.[7]

PUBLIC RELATIONS:

Involvement of library users in the planning process for an online catalog was considered an important factor leading to its enthusiastic support at the University of Missouri.[8] While this public relations option was not open to UW-Oshkosh it is not too late to involve non-library faculty and students in plans for installation, training, etc. Additionally, Corey's article contains an excellent list of anticipated questions about the online catalog. Lawrence's article points out the similarities in automation of banks and libraries and patron acceptance.[9] Important points made in this article which relate to good public relations are: staff education, acceptance, and ethusiasm; sufficient number of terminals; the necessity of a theme for the introductory campaign; and the humanization of the machine.

Using Online Catalogs recommends that an online marketing scheme emphasize the following: prominent and convenient location of online terminals; short time necessary to learn basic skills; no formal training necessary; and improved information retrieval capability (assuming of course that these attributes are true).[10] Lolly Eggers of Iowa City Public Library pointed out in an online conference presentation that the novelty of the online catalog brought them new users, lots of press, and increased community

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[5]Moore, Carole Weiss. "User Reactions to Online Catalogs: An Exploratory Study", College & Research Libraries, July, 1981, p. 295.

[6]Markey, "Subject Searching in Library Catalogs," p.5.

[7]Matthews, Joseph R., Lawrence, Gary S. and Ferguson, Douglas K. Using Online Catalogs: A Nationwide Survey. Neal-Schuman Publishers, Inc., 1983, p. 100.

[8]Corey, James F., Spalding, Helen H. and Fraser, Jeanmarie Lang. "Involving Faculty and Students in the Selection of a Catalog Alternative," Journal of academic Librarianship, Vol. 8, No.6, (January 1983), p. 328.

[9]Lawrence, Gail H. "Libraries Can Learn From Banks," Library Journal, January 15, 1983, p. 105.

[10]Matthews, Using Online Catalogs, p. 102.

pride in the library. She felt in retrospect that the reasons for converting should have had a bigger place in the publicity. Some users complained that they had dumped a cheap, reliable system for an expensive unreliable one. On the other hand, an article by Steinberg and Metz cautions against overselling or failing to emphaisze the short comings and limitations of the online catalog.[11]

USER PROBLEMS:

Studies by Lipow[12] and Steinberg and Metz[13] point out that patrons do have misconceptions about how the online catalog works and what it holds. As a result, while they may be satisfied with the information they receive, it may not represent what is truly available. Farber points out that students are already too dependent on the conventional catalog as a single source of information and there is a danger that this dependence will be even greater with the online catalog.[14] A study by Gouke and Pease showed that patrons had far greater success in title searches in the card catalog than in the online catalog. They found that while library instruction for nonproblem titles had apparently succeeded, instruction for problem titles had not been adequate.[15] Markey's Subject Searching in Library Catalogs described how patrons searched in online catalogs. Many of the features of the LS2000 address the subject searching problems Markey listed in her study.[16]

The CRL study of online catalog users found that most did subject

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[11]Steinberg, David and Metz, Paul. "User Response to an Knowledge about an Online Catalog," College & Research Libraries, January 1984, p. 66.

[12]Lipow, Anne Grodzins. "Practical Considerations of the Current Capabilities of Subject Access in Online Public Catalogs," Library Resources & Technical Services, January/March 1983.

[13]Steinberg, pp. 66-70.

[14]Farber, Evan Ira. "Catalog Dependency," Library Journal, February 15, 1984.

[15]Gouke, Mary Noel and Pease, Sue. "Title Searches in an Online Catalog and a Card Catalog," Journal of Academic Librarianship, Vol.8, No.3, July 1982, p.142.

[16]Markey, "Subject Searching in Library Catalogs," pp.139-142.

searches, even in academic libraries.[17] While they found that patrons did have problems with the online catalog, their recommendations for solutions involved improving the system rather than providing patron training.

The CRL study grouped user problems in the following areas:

1. Using and understanding codes and abbreviations.
2. Understanding terminal displays.
3. Command and control. Patrons can't remember commands, want charts.
4. Subject Searching. Finding the correct subject term is a serious problem.
5. Known item searching.
6. Patience with response time, terminal queuing, and terminal dialog.
7. Library support services: Patrons want writing space and printers.

Markey's OCLC survey found that infrequent and first time users found less than they should through the online catalog.[18] She also found nonusers were concerned about the length of time it might take to learn how to use the online catalog. The CRL study found that users mainly discover the terminals and learn to use them by themselves with printed instructions and help cues, thus instructions are important so that users can solve their own problems as they occur.[19]

Transaction log analysis is one way researchers can find out how patrons are using an online catalog and what problems they are having. Tolle's study shows that patrons have a tendency to repeat errors and if they make an error to follow it with another error. He also found, expectedly, that fewer errors occur as the length of the session increases.[20] It may be useful to use transaction logs to evaluate changes in online catalog instruc-

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[17]Lawrence, Gary S. "Users Look at Online Catalogs: Results of a National Survey of Users and Non-Users of Online Public Access Catalogs. Final Report." California University Berkeley, November 16, 1982. ED 321 395.

[18]Markey, Karen. "Online Catalog Use: Results of Surveys and Focus Group Interviews in Several Libraries," Research Report OCLC Online Computer Library Center, Inc., Vol II (3), March 31, 1983, p.5.

[19]Matthews, Using Online Catalogs, p. 108.

[20]Tolle, John E. "Current Utilization of Online Catalogs: Transaction Log Analysis," Research Report OCLC Online Computer Library Center, Inc., vol. I (3), March 31, 1983, p. 106.

tion.

In summary, while studies report very favorable attitudes of patrons toward online catalogs, patrons do experience difficulties with them and may not do as well in locating materials in them as they did in the card catalog. To quote one patron, "I know that I do better in the card catalog...but I still prefer the online."[21]

TEACHING THE ONLINE CATALOG:

In her argument against making the online catalog too easy Arret suggests that the librarian should support sophisticated learning that can be transferred across systems and libraries.[22] This would indicate that the library instruction program should not underestimate the intelligence of the patron. In the age of information, the librarian should not be satisfied if the student knows only how to get "enough stuff to write a five page paper." To train him/her for only this level of searching does not prepare the student for effective information use in the future. The Northwestern University Nielsen-Baker report would tend to agree with Arret that teaching sophistication in use and a conceptual overview is necessary. Nielsen and Baker see the conceptual framework, if not the skills, as being transferrable to other automated systems. They also admit that "when the new tool is taught solely in terms of the old (the card catalog), it is not likely that sufficient challenge will be perceived by the user to sustain his or her interest in the learning activity."[23] This supports their argument for developing instruction that will integrate general principles of information retrieval, provide the user with a mental model, and challenge the user. This study also found that course intergration was important when teaching the online catalog. The novelty of automation alone was not a sufficient hook to attract students to workshops on the online catalog. This report provides a model objective, program, brochure, presentation outline, and tests which should be most useful planning an instructional program for the online catalog.

An article by McDonald and Searing stresses setting objectives and establishing lesson plans for teaching the online catalog.[24] It also advises that bibliographic instruction librarians be involved in the design of online tutorials, prompts, etc. They

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[21]Gouke, p.143.

[22]Arret, p. 120.

[23]Nielsen, p. 33.

[24]McDonald, David R. and Searing, Susan E. "Bibliographic Instruction and the Development of Online Catalog." College & Research Libraries, January 1983, p. 10.

point out that the online catalog does not parallel other library tools, the card catalog, indexes, and other everyday publications such as phone directories. The online catalog is not alphabetical. This would seem to support the Nielsen-Baker contention that the user needs to be provided with a new conceptual framework for the online catalog.

A survey conducted at Ohio State University revealed the following breakdown in how patrons learned the online catalog: 22% by one-on-one instruction from library staff, 11% by friends and other methods, 34% from handouts, and 33% from formal workshops.[25] While this indicates a higher success rate than Northwestern enjoyed with their workshops, it should be noted that OSU seems to have a particularly difficult system. This study emphasized the need for a variety of formal and informal instruction methods, studying patron errors, and designing improved systems and instructions.

A study of the Virginia Tech Library System (VTLS) found that 58% of the patrons learned the system from printed instructions, 14.1% from library staff, and 10.6% from HELP features. Furthermore, 78.8% considered their searches successful and 81.2% felt the system to be easier than the card catalog.[26] However, there seemed to be serious misconceptions by the patrons in system coverage and the utility and means of subject searching. It would appear that the users do not have a clear mental picture of the database or how to get at the information inside. The patrons are described as being perhaps too optimistic about the capabilities of subject searching. This is a problem which needs addressing by both library instruction and system design.

Kern-Simirenko's article provides examples of what can be learned from transaction logs and applied to online catalog instruction. She finds that users approach the online catalog from different study areas will have varing degrees of difficulty in selecting valid and precise terminology. Therefore, "bibliographic instruction...may well be most effective when focused on search strategies for particular areas of study."[27] A sample lesson of online subject search strategy is provided.

Excellent advice on designing point-of-use instructions is

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[25]Pease, Sue and Gouke, Mary Noel. "Patterns of Use in an Online Catalog and a Card Catalog," College & Research Libraries, July 1982, p. 290.

[26]Steinberg, p. 67.

[27]Kern-Simirendo, Cheryl. "OPAC User Logs: Implications for Bibliographic Instruction," Library Hi Tech, Vol.1, No.3, winter 1983, pp.34-35.

provided in a short article by Linda Wilson of Virginia Tech.[28] Important criteria are the illusion of brevity, simplicity, and physical characteristics. A multi page manual or flip chart with only a few simple instructions per page is advised to be better than a lot of information crowded on a single page.

The problem of providing library instruction for the faculty and gaining their support for the online catalog was addressed by Marcella Stark of Syracuse University.[29] They had followed a carefully planned strategy involving a slide tape introduction before implementation, on campus publicity, booklets describing basic searches, and faculty seminars. The seminar appeared to be similar to the faculty college program at UW-Oshkosh. They also provided workshops for their own library staff. Like other libraries they staffed the terminal area with additional librarians during peak hours. A study of their users found a tendency to use card catalog techniques to search the online catalog, keyword capabilities being ignored. Points made in the article were: Have at least two presenters, one to key in information, have handouts, have librarians trained in indepth searching, get sponsorship from other groups, expect a range of abilities, leave time for hands-on, and use a projection system.

While not about the online catalog, George and Hogan's article, "What's 3 x 5 and full of Holes?", discusses the difficulties in teaching the card catalog. Much of the same applies in teaching the online catalog and the fact that many do not understand the card catalog makes it that much more difficult. The need for a conceptual understanding of the catalog is underlined.[30]

Instruction manuals found in ERIC and materials produced in a SPEC Kit from OMS[31],[32],[33] provide examples of materials actually

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[28]Wilson, Linda. LIRT News. Chicago, ALA, September 1984, pp. 5-6.

[29]Stark, Marcella. 'Using the Online Catalog Effectively," C&RL News, June 1984, p. 301.

[30]George, Mary, and Hogan, Sharon. "What's 3x5 and Full of Holes?", Research Strategies, vol.1, No.3, Summer 1983, p. 137.

[31]"CLSI On-Line Public Catalog Keyboard Terminal Manual: Training Manual." California State University, Chico, 1982. ED 225 586.

[32]Arnold, Jane; and Others. "The OCLC Terminal: An Instruction Manual", Michigan State University, East Lansing. University Libraries. 1982. ED 221 164.

in use. These, along with other materials collected, should be examined critically before producing instructional materials. A clear need is seen for the application of Linda Wilson's principles of the illusion of brevity, simplicty, and attention to physical characteristics.

Markey's survey of users of five online catalog systems results in quite a number of useful suggestions. As with other surveys she found that users had difficulty in knowing what was in the database. Methods used to inform patrons of coverage and contents included: workshops, groups and individual instruction, permanent mounted guides, free guides or brochures, permanent signs, and online messages at the end of each search suggesting other resources.[34] She also found that users desired a variety of ways to learn the online catalog and did not necessarily want to ask a librarian. In her summary she provides a checklist for the production of printed materials:

1. Prepare printed materials of varying lengths.
2. Include meanings for abbreviations used in OPAC records.
3. Show examples of major search approaches, ie., author, subject, etc.
4. Identify field labels and field information in examples of the available bibliographic record displays.
5. Avoid small print, footnotes, jargon.
6. Highlight the basics of subject searching.
7. Enumerate the coverage and contents of the database and tell users when they should also consult the library's other catalog(s).
8. Pretest printed materials.[35]

Markey found the relearnability of the online catalog was of special concern to library users and staff. Any libraraian who searches Dialog and BRS and SDC in varying frequencies can appreciate the problems of a patron who searches the online catalog only occasionally.

The CRL survey of online catalog users and nonusers found that users see the terminals and wish to train themselves and thus clear instructions are of prime importance. Also of high importance is a well trained staff. They also find that nonusers will not use or take advantage of promotional programs targeted

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[34]Markey, "Online Catalog Use," p.158.

[35]Markey, "Online Catalog Use," pp. 203-204.

at the catalog itself. Thus, anything of this type should be course or subject oriented. Nonusers are generally not opposed to the online catalog, they simply do not have a need to use it. The use of an online terminal at the reference desk is cited as an important teaching and promotional tool.[36]

SUMMARY:
In summary the literature indicates that:

1. Users and nonusers have a favorable attitude toward the online catalog.

2. Generally the online catalog itself is not enough of a hook to make patrons want to learn about it. They must have a need to use the library. Course integrated instruction of the online catalog is most productive.

3. The catalog tends to sell itself when placed in a prominent location.

4. The card catalog was (is) not simple. Patrons will have as much or more trouble and the same middling degree of success in searching the online catalog as the card catalog.

5. For the above reason, library instruction, reference assistance, and staff experience remain of prime importance.

6. Patrons often have a misconception of what is contained in the online catalog and how to get at it.

7. Patrons need help in forming a correct mental model of the online catalog.

8. Online searching (as offline searching) is a sophisticated and challenging topic and must be taught as such. To oversimplify it is not being fair to the patron. The patron is not stupid.

9. Transaction logs may be useful in evaluating library instruction. They allow us to see the search process of the patron.

10. Patrons wish to learn the online catalog in a variety of methods, often independently. Thus a variety of approaches need to be developed.

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[36]Matthews, Using Online Catalogs, p. 176.

11. Written instructions should appear to be brief and simple, even though the subject is complex.

12. Special efforts should be made to gain faculty support and confidence in the online catalog.

13. The problem of relearnability needs to be addressed in all forms of online catalog instruction.

SURVEY RESULTS

To take advantage of the experiences others have had, a short survey was designed and sent out in May 1985. The survey included 7 short answer questions and 3 requiring more detailed answers (Appendix E). It was mailed to 45 colleges and universities using various systems. The cover letter was addressed to the individual in charge of the system or to the bibliographic instruction librarian and included a request for samples of any materials, handouts, etc. used by the library. (Appendix F is a list of the institutions sending sample material; the samples are available as a separate file.)

Twenty-six institutions responded; of these, 20 contained useable data and 6 had not yet implemented their online catalog.

Time Required to Teach the Online Catalog

Questions one and two of the survey asked how long it takes to teach a patron to do a basic search and then a more sophisticated search. Over 80% of the time, 5 minutes is sufficient to teach the basic search techniques with some respondents needing only 1 minute. To teach the more sophisticated search however, there was considerable disagreement. The times specified showed tremendous variablity and ranged from 2-3 minutes to over 60 minutes. Tables 1 and 2 summarize the results.

TABLE 1: FIRST USE OF ONLINE CATALOG
Time to Teach a Basic Search

5 Minutes or Less:	16	84.2%
6-10 Minutes:	1	5.3%
Over 10 Minutes:	2	10.5%
Total Response:	19	100.0%

TABLE 2: SUBSEQUENT USE OF ONLINE CATALOG
Time to Teach the More Sophisticated Search

5 Minutes or Less:	7	43.8%
6-10 Minutes:	1	6.3%
11-20 Minutes:	4	25.0%
21-30 Minutes	0	0.0%
Over 30 Minutes:	4	25.0%
Total Response:	16	100.0%

Preferred Teaching Methods

The third question requested that the respondents rank various teaching methods for various groups. The question asked for the teacher's preferred method and did not consider the teaching time involved as a factor. There was no significant difference in the methods preferred for different groups of patrons. For all groups - graduate students, undergraduate students, faculty and library staff - one-to-one instruction was deemed best. Group sessions was the second choice, followed by handouts and finally help screens. Tables 3-6 summarize the findings. Workbooks, charts, manuals and signs were also used to instruct the user. Although video or slide presentations were not specifically offered as an option, it is interesting to note that both were never mentioned as a viable teaching method.

TABLE 3: PREFERRED METHODS OF TEACHING
For Graduate Students

TYPE/ RANKING	1	2	3	4	5	Total No. Responses
Handouts	2	1	9	5	1	18
Groups	1	12	1	2	3	19
One-to-One	13	5	0	1	0	19
Help Screen	1	3	5	6	1	16
Other	1	1	0	0	2	4

TABLE 4: PREFERRED METHODS OF TEACHING
For Undergraduate Students

TYPE/ RANKING	1	2	3	4	5	Total No. Responses
Handouts	2	1	10	5	1	19
Groups	1	13	1	1	3	19
One-to-One	13	2	2	2	0	19
Help Screen	1	3	4	7	1	16
Other	1	1	1	0	2	5

TABLE 5: PREFERRED METHODS OF TEACHING
For Faculty

TYPE/ RANKING	1	2	3	4	5	Total No. Responses
Handouts	2	1	10	5	1	19
Groups	0	12	1	2	3	18
One-to-One	13	2	2	1	0	18
Help Screen	1	3	4	7	1	16
Other	1	1	0	0	2	4

TABLE 6: PREFERRED METHODS OF TEACHING
For Library Staff

TYPE/ RANKING	1	2	3	4	5	Total No. Responses
Handouts	2	2	7	5	0	16
Groups	1	11	1	2	2	17
One-to-One	15	3	1	1	0	20
Help Screen	0	2	7	6	1	16
Other	0	1	0	1	0	2

Public Relations

The fourth question on the survey concerned the type of publicity used to acquaint the university community with the new online catalog. The assumption was that "advertising" the new catalog would bring users into the library and thereby present an opportunity for educating them. Seven choices were listed and respondents were asked to check which ones they had used both before and after impementation and which ones they would recommend. The most frequently used and most highly recommended method was news releases. The least used or recommended were video tapes and slide tapes. Since the questionnaire did not ask why different menthods were selected it is speculation that perhaps news releases were inexpensive and quick and video/slide tapes expensive and time-consuming. Other methods used and recommended are faculty/staff mailings, school newspaper, library tours for freshman and new faculty, handouts on campus, T-shirts for the staff and stickers for users. Table 7 lists the various types of publicity and the responses.

TABLE 7: PUBLICITY FOR THE ONLINE CATALOG
Types Used by the Respondents Before and After Implementation; and Those Recommended

TYPE	BEFORE	AFTER	RECOMMEND
News Releases	11	13	17
Posters	8	5	10
Presentations	8	12	12
Radio - TV	1	4	7
Slide Tapes	0	3	2
Vendor Demos.	3	0	4
Video Tapes	1	2	3
Other	7	3	7

Problems

Three questions on the survey were designed to solicit a free-form answer. The first of these asked about major problems associated with training for the online catalog. The majority of the problems cited dealt with the practicalities of teaching the online catalog. Most often mentioned was the problem of identifying those patrons who needed help and did not feel comfortable asking, and balancing this with a need to respect the patron's privacy. Related to this is the difficulty in follow-up training after an introductory session. Several institutions mentioned the difficulty of getting students to read help screens, handouts, etc. One institution characterized this as student "apathy and laziness."

Another major problem cited was determining the content of the instruction. Teaching the difference between using a word as a term or using it as a subject was a difficult concept mentioned several times. Explaining carefully what was included in the database and what was not included was also emphasized as a potential problem to avoid.

Finally, two respondents did mention 'terminal freeze' and 'computer phobia' as problems that they had to overcome.

Successes and Innovations

The successes and innovations listed were more varied and covered a wider range. One success mentioned several times was the use of a data projector for group instruction or presentations. The data projector took the image on the terminal screen and projected it onto a movie screen. The second most frequently mentioned success was the use of locally developed help screens. Some of the other interesting success and innovations included online access to peripheral collections such as telephone books, college catalogs, etc.; an online "suggestion box;" remote access

to the collection; a standard outline for the instruction of groups. The general feeling was that the online catalog was easily accepted by the university community.

Screen Privacy

The third free-form question dealt with the question of screen privacy - had this concern been dealt with successfully? Of the 15 institutions who answered this questions, 7 did not feel that screen privacy was a problem; the situation had not been dealt with because it had not come up. The remaining 8 respondents felt that the problem could be solved or avoided by providing enough terminals to avoid the queing problem and by the strategic placement of the terminals. Suggestions for placement included facing a wall, a star-shapped arrangement, or sit-down carrels.

Conclusion

The overall response to teaching the online catalog was that it is 'no big deal.' Teaching the online catalog is quick and easy, and most effectively done on a one-to-one basis or integrated into the bibliographic instruction program.

RECOMMENDATIONS FOR TEACHING THE ONLINE CATALOG

Primary Tasks

1. Timetable:

Prepare a timetable and checklist indicating what is to be done in accordance with an established schedule. This will allow the library to plan for what is to come, to be ready with the necessary handouts, overheads, signs, lessons plans, etc. and to meet deadlines. It is essentially a budget plan for time. A sample timetable/checklist is attached as Appendix A.

2. Budget:

Prepare a budget to support the library instruction program. This should be done as soon as a timetable is constructed and needs are identified. Increases in regular library budgets or special one-time-only funds must be identified as soon as possible so that they can be included in the regular budget cycles.

Increases in the regular budget may result from the publications necessary to support the online catalog, i.e. handouts, manuals, signs, etc. These will undoubtable need to be updated and/or replaced on a regular basis. Maintenance costs for library instruction equipment should also be included.

One-time-only costs will include the purchase of equipment, public relations efforts, and probably some personnel costs. To prepare the library instruction materials initially may necessitate the hiring of a typist, artist, etc. To introduce the new system and maintain usual services, it may be necessary to hire additional reference librarians for a limited period of time.

3. Strategies for Library Instruction:

Determine goals and objectives for library instruction in general and for the online catalog in particular. This has probably already been done, but may be quite informal and unwritten. The point is that they should be clearly articulated in writing. An example from the Northwestern University study is attached as Appendix B.

Prepare lessons plans and outline the material to be covered relating to the new technology. This can then be easily

incorporated into the bibliographic instruction for any one specific subject. It should also assist in the one-to-one instruction at the terminal and in the preparation of handouts. Two potential problem areas mentioned frequently are 1) teaching the concept of keyword searching and 2) clarifying what is and is not included in the online catalog.

As with other library instruction, teaching the online catalog is generally less effective if the patron does not have an immediate need to use the system. Therefore, formal presentations which are not course integrated are less desirable. An exception might be instruction for faculty, but even this should have a subject or research emphasis if possible. Northwestern University has found that in depth scheduled workshops on the use of the online system (without course integration or subject emphasis) have not been well attended.

The difference in teaching the online catalog in course integrated instruction and teaching the card catalog as we now do, is that students will probably not have the preconceived notion that they already know the online catalog. Thus, the likelihood that we can increase the students skill level in using the catalog is increased.

It is recommended that one-to-one sessions for the teaching faculty be offered on an appointment basis. This instruction would not be conducted in a public area. This service should help overcome the reluctance of some faculty to use and recommend the new catalog.

Practice or rehearse with library staff and student assistants. This serves severals purposes. It insures that the staff teaching students and faculty the online catalog will themselves be comfortable and confident with the system and will pass this attitude along to their students. It allows any misconceptions or awkward moments to be identified and cleared up before being presented in the classroom setting. And finally, it insures that all library staff and students are familiar with the system.

Student assistants and staff should be trained to demonstrate the system during peak hours at the beginning of each semester. The demonstration terminal should be placed in a high traffic area. Only basic searching with a set script should be done. The objective is to show what the system will do and, by using a student, to make other students comfortable with trying it.

4. Library Personnel

The online catalog terminals will be available throughout the library and access will be available from all parts of the Campus and through dial-up. Therefore, it is essential that all library personnel be familiar with the system. In the past it may have been sufficient that the reference staff were primarily responsible for teaching the card catalog, but there is no longer one card catalog in one location.

All library personnel should be trained in the use of the online catalog. During peak times at the beginning of a new semester, they can be available to help out at the main terminal sites. Non-reference staff may also have to explain the catalog at terminal sites in the stacks, at the circulation points, at other locations on campus, etc.

All library personnel should be kept informed about the new system. An informed, enthusiastic staff will smooth the transition form the old system to the new. In particular, a list of relevant and/or frequently asked questions with answers should be prepared and distributed to all. This will reduce the chance of misinformation or the equally damaging "Who Knows?" reply that lack of information promotes. A sample question/answer sheet is attached as Appendix C.

5. Cooperative Efforts:

Cooperative efforts with groups both on campus and off take advantage of the expertise of others, reduce duplication of effort, and promote good public relations.

Campus organizations, already in place, should be utilized whenever possible. Groups such as the Oshkosh Student Association, the resident hall governments, FLAIR (Library Science student group), etc. should be informed of the new system and encouraged to attend a demonstration/instruction.

Perhaps even more important, faculty groups should be targeted for demonstrations/instruction. Use of the library by students is usually in direct relationship to the interest and assignments of the teaching faculty. Groups such as the Academic Computing Users Group (ACUG), the Computer Science faculty, the Koehn Institute, the Business faculty, the Library Science faculty are already interested in computer technology and its applications. Groups such as the Commission on Academic Affairs, the Teaching Excellance

Center, Retention Task Force, Improvement of Instruction Committees and of course, individual faculty are interested in the quality of instruction. Small group demonstrations could be scheduled for committees, for department or college meetings, as part of the Faculty College Program. With the availability of dial-up access, the instruction could go to the faculty rather than waiting for them to come to the library.

Cooperative efforts should also be explored with groups outside the university. Since the system selected will eventually be installed at all university cluster libraries, cooperation in the development of library instruction approaches and materials is possible. UW Sytem support in the form of Undergraduate Teaching Improvement Grants (UTIG) or Urban Corridor Grants may be available.

Library Instruction Materials

1. Content of Materials

Perhaps critical to the success of the library instruction program are the materials produced to support the instruction. Many needs and conflicting interests must be addressed. There will be students who desire a quick and easy way to search the catalog and those who wish to do an exhaustive search. There will be faculty wanting one-to-one instruction in private and those comfortable teaching themselves in the Reference area. There will be those who use the library every day and the occasional user who must relearn the catalog every time. Some will be happy with a bookmark set of instructions and some will want the manual. The library instruction program must achieve a balance to meet these varying needs and maintain the integrity of the program.

The first factor to consider when determining the content of the library instruction material is the sophistication of the system. What can the system do? What will <u>it</u> teach the user? Is it easy or difficult to use? Assessing the capabilities of the system, identifying its strengths and weaknesses, will simplify the library instruction process.

The second factor to consider, the user's knowlegde of libraries and computers, is more difficult to pinpoint. Obviously the experience of the user with the library and the computer will vary greatly from individual to individual. However, generalizations can be made, and materials can be tailored to meet the needs of various groups identified. Experienced library instruction staff are already familiar with the varying levels of library experience;

computer experience is one more factor to consider. The important result should be that different material must be produced to deal with the different levels of experience.

Before producing any materials, key concepts and ideas should be identified and then repeated in various ways. After goals and objectives are formalized, key concepts and ideas should be evident. The literature review and the survey both emphasized the problem of teaching the 'keyword' concept. What is the difference between a keyword and a subject? Another problem mentioned is teaching what exactly is included in the computer catalog and what is not. Related to both the above problems is explaining the difference between the card catalog and the online catalog, that is, creating an accurate 'mental picture' of the online catalog for the user.

General informational material will also be needed in addition to the 'how to' material. What the system is, what it does, the advantages and disadvantages, anticipated questions and answers .... handouts or signs should be prepared to handle these kinds of informational requests.

2. Format of Instruction Materials

All library instruction materials should give the appearance of simplicity and brevity whenever possible (Appendix D). One way to accomplish this is to have a lot of 'white space' on the page, handout, etc. and to eliminate all unneccesary information. Most patrons will be interested in getting started quickly and easily.

Quick and easy instructions are especially suitable for materials such as a bookmark, a one page handout, signs, or command charts at the terminal - something that will not overwhelm the user who just wants to find a book.

For the user who wants and/or needs more information, a multi-page handout detailing the concepts of the online catalog and the more sophisticated search capabilities should be prepared. In addition, a booklet of the system 'help' screens can be compiled and available.

Instructions for dial-up access and for access from the other terminals on campus must be ready for distribution to those who are interested.

A handout with general information on the system, not instructions on how to use it, should be prepared. This can be available in the library and distributed to prospective students and faculty through the various offices and

departments on campus. This information, along with information on anticipated questions/answers, should be given to all library staff.

While the online catalog itself, using one-on-one or large screen classroom teaching methods, should be the primary audiovisual tool, a set of overheads showing search strategy should be prepared as a backup. Overheads can be created directly from the online screens. Other overheads which will help give the student a reliable mental picture of the online catalog should also be devised. The above methods are recommended over other AV formats in teaching the online catalog.

Two formats for library instruction not mentioned in the literature reviewed or highly recommended in the survey are video tapes and slide tapes. However, an introduction to the online catalog -- briefly what it is, what it does, and what it contains (but not how to do it) should be a part of any video or slide tape introduction to the library.

Equipment

1. Library Instruction Equipment:

To insure a successful library instruction program, it is essential that the proper equipment be available at all times. (Remember that the card catalog was always available.) The library instruction staff should not have to be concerned with 'dragging' in equipment, setting it up, worrying about its workability; they should be free to concentrate on the instruction itself.

The library instruction program must have at least one dedicated terminal permanently located in the library instruction area. In addition, it must have a data projector and a large screen or several large monitors linked directly to the terminal. Again, this equipment must be permanently located in the instruction area.

In addition to the dedicated equipment, there must be designated back-up equipment (at least one terminal) available on demand. Finally, the library instruction program should have a modem and a terminal available for use at remote site instruction.

2. Other Equipment Concerns:

In addition to the equipment necessary for a successful library instruction program, there are several other concerns which will affect library instruction.

In the Reference area, a terminal must always be available for one-to-one instruction by library staff. This could be handled with a sign indicating 'staff priority' on a terminal for general use or with a terminal at the Reference Desk.

One or more terminals should be available in a more private setting to provide an opportunity for instruction out of the public eye. These terminals can also be used by the patron needing a terminal for an extended period of time, or by a handicapped patron.

Finally, sufficient terminals will help to avoid both queing problems and invasion of privacy concerns.

Public Relations

1. University Public Relations:

The advent of the online catalog is an opportunity to 'advertise' the University as an institution with the lastest in technology. The Library is an important part of the university and is usually described in any material sent to prospective students or faculty.

Material on the new system, with the advantages for students, should be prepared and regularly updated. It should be distributed to the University Admissions Office, the Recruitment Office, and the Residence Life Office as soon as a system is chosen. The time line from selecting a system to final installation is such that the University offices involved in recruiting can use the automated library as a 'selling' point for incoming freshman. Features of the system such as dial-up access, access from all terminals on campus, faster access to new materials, etc. should be emphasized.

The same or similar material should be sent to all department chairpersons. Library resources and easy access to the collection is important to incoming faculty whose teaching and research depends on the library.

In addition, regular press releases should be prepared for the university newspaper, the local city newspaper, high school newspapers, TV/Radio, local library organizations, etc. The purchase of a computer system costing over $500,000 to support the library is an opportunity to create favorable publicity for the University.

2. Library Public Relations

The installation of a new computer system is also an opportunity to publicize the library on campus. While the obvious reason for presentations, signs, news releases, etc. is the new computer system, the opportunity to inform and educate the campus about the library and its many services should not be missed. In the process, images can be changed, misconceptions can be cleared up, library usage can be increased.

It is essential that the reasons why the library is automating its catalog be made clear. It is a common misconception that 'the card catalog was cheap and reliable,and that the online catalog is expensive and unreliable.' The card catalog and the online catalog are two different things and the advantages and disadvantages of both should be clarified. Material should be prepared anticipating these types of questions. It is especially important that all library staff be prepared to deal with the 'why' question.

Publicity for the online catalog should emphasize 1) the location of terminals, 2) the short time necessary to learn the system, 3) the improved information retrieval capability, and 4) what is included in the system.

Presentations and demonstrations should be scheduled for groups interested in computer technology and in the quality of education (see groups listed under Cooperative Efforts.) These should be targeted as key groups whose support will insure the success of the online catalog. The 'true believers' will spread the word to their colleagues.

It is also important to offer presentations/demonstrations to department and college level groups. A faculty member will feel better knowing at least as much as his/her students. Since faculty frequently do not have the time for a special trip to the library, the information must be provided at their convenience.

The students should not be ignored in the library's outreach program. The library staff should be prepared to speak to the various student organizations. Presentations should be made in the dormitories where terminals already linked to the main computer (and eventually the library computer) are available. Temporary terminals could be set up in the student union or in the classroom buildings for a short period of time.

Several other activities recommended are 1) design and

produce publicity materials for staff and patrons such as t-shirts, stickers, buttons, bookmarks, bumper stickers, etc., 2) obtain indorsements from 'famous' faculty, students and adminsitrators and use them on posters around campus and 3) the design and selection of a logo and/or the personification of the system. This last is an important consideration. Both staff and patrons generally feel better about and more protective of a personified system. Pick a 'soft' name, e.g. APPLE vs. LS2000.

TIMETABLE AND CHECKLIST OF ACTIVITIES

DEADLINE		ACTIVITIES
Immediately	____	Prepare Timetable.
Budget Cycle	____	Prepare Budget for inclusion in 86-87 budget cycle, i.e. Fall 1985, and include additions to base and one-time-only requests.
----------		Determine Strategies for Library Instruction:
January '86	____	Determine goals and objectives
Spring/Summer '86	____	Prepare lesson plans
Summer '86	____	Practice or rehearse
----------		Involve ALL Library personnel:
Summer '86	____	Train in use of online catalog
Fall '86	____	Use for demonstrations at peak times
Ongoing	____	Keep Informed
----------		Promote Cooperative Efforts:
Fall '86	____	Involve students groups
Fall '85	____	Involve faculty groups
Fall '85	____	Apply for UTIG or Urban Corridor Grant
----------		Determine Content of Library Instruction Materials:
Spring '86	____	Assess capabilities of LS2000
Spring '86	____	Identify various users' levels of experience
Spring '86	____	Identify key concept to teach

Spring/Summer '86		Write and Design:
	____	brief instructions for each terminal
	____	brief instructional brochure
	____	detailed search manual
	____	dial-up access instructions
	____	general non-instructional brochure
Summer '86	____	Test drafts of above materials
Fall '86	____	Produce above materials
----------		Obtain Necessary Equipment:
January '86	____	Purchase or allocate terminal
May '86	____	Purchase data projector/screen or monitors
Summer '86	____	Designate backup equipment
Summer '86	____	Designate terminal/modem for remote site instruction
----------		Identify Equipment in Reference Area:
Summer '86	____	Designate 'staff priority' terminal
Summer '86	____	Identify terminal for 'private' instruction
----------		Begin Public Relations Activities:
Fall '85	____	Designate Public Relations Coordinator
Fall '85	____	Contact Admissions, Recruitment, Residence Life offices
Fall '85	____	Contact Department Chairpersons
Ongoing	____	Prepare press releases
Spring '86	____	Solicit and schedule presentation for students, facutly and others
Spring '86	____	Name the Computer
Spring '86	____	Design T-shirts, stickers, bookmarks, posters, etc.
Summer '86	____	Produce above

APPENDIX ONE: Learning Objectives for Online Catalog Education

General Objective:

Upon completion of the instructional activity, a user should have an understanding of the function and scope of the online catalog system and be self-sufficient in using computer catalog public terminals to perform non-problematic monograph and serial searches.

PROGRAM OBJECTIVES

1 The user understands what the online system represents.

2 The user understands selected concepts of an online information retrieval system.

3 The user can operate the equipment accompanying the online catalog such as the terminal, keyboard, and printer.

4 The user is able to structure an online catalog search by correctly choosing, entering, and manipulating appropriate search commands.

5 The user can correctly interpret the results of a search and can identify information from it that is pertinent to his/her information needs.

USED WITH PERMISSION FROM Brian Nielsen. Educating the Online Catalog User: A Model for Instructional Development and Evaluation, Northwestern University Library, Evanston, IL., January 4, 1985.

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Learning Objectives for Online Catalog Education

eral Objective: Upon completion of an online catalog instructional tivity, a user should have an understanding of the function and scope the online system and be self-sufficient in using computer catalog lic terminals to perform monograph and serial searches.

rogram Objective E=Enabling Objective

The user can describe what the online system represents.

1. The user understands the function and purpose of the online catalog.

E1 The user can define the phrase "online computer catalog," and understands that he/she interacts directly with the computer's memory and logic when operating the keyboard and terminal of the online catalog.

E2 The user understands that the public terminal, screen, and keyboard are used to transmit a catalog search question on the terminal screen to the computer.

E3 The user can recognize and define basic computer terms such as command, database, online, terminal, and search term.

1. The user can define the scope of the database in terms of the types of materials included and excluded and the dates of coverage.

E1 Given a citation, the user can decide whether to look in the

card catalog, the online catalog, or an index to locate the item cited.

E2 The user can identify the different types of information that are available in the online catalog, such as bibliographic (author, title, publisher, date of publication), circulation, library location symbols, cross-reference provision and call numbers.

The user understands selected concepts of an online information retrieval system.

E1 a. The user can distinguish between subject searching and other forms of searching.

E1 b. Given a subject search, the user selects terms from LCSH, MESH, or other controlled vocabularies as appropriate.

E1 c. Given a search other than subject, the user selects uncontrolled terms in appropriate formats for searching.

E2 The user understands the purpose of truncation and the way it is implemented in the specific system. She/He demonstrates understanding of truncation by applying it at appropriate times and in the appropriate form.

E3 Given a list of terms, the user can distinguish between terms which are meaningful as keywords for searching in the online catalog and those which are not meaningful.

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The user can demonstrate how the equipment accompanying the online catalog is operated (e.g., terminal, keyboard, printer).

E1 The user is able to use the alpha-numeric, transmitting, and special function keys (enter key, reset key, clear key) on the keyboard correctly.

E2 The user is able to identify commonly-held misconceptions regarding the use of computers and computer terminals, specifically the fear of damaging the system by incorrectly operating the equipment and expecting system correction of inputting errors.

E3 The user is aware of the existence or lack of existence of sign-on procedures required by the online catalog.

4 The user is able to structure an online catalog search by correctly choosing, entering, and manipulating appropriate search vocabulary.

A. The user can state the existence of the different methods of searching the online catalog.

E1 The user is able to enter each of the commands that retrieve various records from the online catalog correctly. Given an author, title, or subject command, the user is able to choose the appropriate command for his/her information need.

E2 The user is able to combine a search command with an argument.

E3 Given an information need which requires utilizing the subject searching capability of the online catalog, the user will select the appropriate printed source (such as Library of Congress Subject Headings, Sears Subject Headings, Medical Subject Headings), if any, to correctly format the search.

E4 The user avoids common inputting errors and is aware that inputting errors can cause a search to fail.

E5 The user is able to locate a unique bibliographic record, given partial or complete information about the desired item.

E6 Given a choice between initiating an author, title, or subject search, the user will select the most system-efficient search category for his/her information need.

E7 The user can employ special searching features available for the system in the search process such as truncation, key word searching and use of boolean logic.

B. The user is able to utilize system features in order to manipulate retrieved data and fully exploit system capabilities.

E1 The user is able to recognize and identify different categories of display within the system.

E2 The user can explain the function of the key data elements provided in each display in order to complete or continue a search.

The user can correctly interpret the results of a search and can identify information from it that is pertinent to his/her information needs.

E1 Given a bibliographic record display, the user is able to identify author, title, publication date and publisher and call number from the record.

E2 Given a complete citation, the user can locate useful information in the record, such as author birth and death dates and collation.

E3 The user can interpret any online error messages.

E4 Given an error message, the user can return to point at which error was made and proceed correctly.

E5 Given a library location code from a screen of information, the user is able to identify correctly the area of the library in which the material may be found.

E6 The user is aware that online assistance is available for the online catalog in the form of help screens.

E7 The user recognizes the library staff as a source of information about the online catalog and uses when appropriate.

University of Wisconsin-Stout
Library Learning Center
Menomonie, Wisconsin

Automated Library Information System (ALIS) Fact Sheet

Why install an automated library system?

* Provides easy and efficient access to information about library resources, including items on Reserve.
* Permits patrons to search for items to determine location and current status (on the shelf, charged out, on order) in one process.
* Automates library public catalog searching, circulation, acquisitions, and cataloging processes.
* Allows for immediate addition, correction, and deletion of records in the public catalog.
* Offers the potential for users to access records simultaneously from terminals located throughout the library and the University.
* Provides the printing of screen displays as an optional service for patrons.

Why was ALIS chosen over other available products?

Several systems offered special and valuable features. At the time of selection, only ALIS offered the capability to store the entire bibliographic record, in a form meeting the national standard, for each item in the LLC collection. The Library Learning Center staff felt that this facility was necessary.

How much did the system cost and how was it funded?

Cost: $267,000
Source of funds: Library Learning Center building funds, 1981.

Will the LLC card catalog be maintained? If not, why not?

The card catalog will not be maintained after the ALIS public catalog provides easy access to subject headings.

Maintaining the card catalog as well as the ALIS system would cost a significant amount of money and time. Staff work would be duplicated for the manual and automated systems. Also, the card catalog can never be as accurate as the online catalog: There is a delay of several weeks before cards arrive; cards can be misfiled and torn out; the card catalog cannot inform patrons of items on order, charged out, on the shelf, etc.

There will be a Computer Output Microfiche (COM) backup for the ALIS system, should ALIS not be available for a brief period.

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What functions are available on the ALIS system?

Public Catalog	* Searching by Author, Title, Author/Title, Call Number, Subject, and Subject Boolean in addition to several other internal library search needs. * Current status displayed on screen (SHELF, CHECKED OUT, RENEWED, ON ORDER, etc.) * Easy access by users from terminals located throughout the library and the University. * Printer availability for the printing of screen displays. * Full bibliographic records are available to staff.
Circulation	* Facilities for Charge, Renew, Discharge, Holds, Blocks, Fines, Notices, and Reserve. * Patron database is loaded from computer tape, and is maintained either from computer tape or online entry.
Cataloging	* Direct online transfer of bibliographic records to ALIS from OCLC terminals. * Ability to edit specific item records and bibliographic records as necessary. Changes are immediately available online.
Acquisitions	* Fund Accounting including Fund Auditing. * Capability to create purchase orders, tracking cards, supplier records, and voucher reports.
Reports	* Function-oriented reports as well as administrative reports.

What is the Library Learning Center's automation history?

1967	* Stout library began converting to machine readable database.
1972	* COM (Computer-Output Microfiche) catalog produced and placed in residence halls and faculty offices.
1976	* Stout signs contract with Online Computer Library Center (OCLC) to provide computerized cataloging.
1978-1980	* Stout converts all bibliographic records via OCLC into machine readable Library of Congress format.
1980	* Request for Proposal (RFP) developed for an online computerized catalog, circulation control and data management system.
1981	* DataPhase Systems, Inc. won the bid.
1982	* Automated Library Information System (ALIS) installed.
1983	* Online public catalog, circulation, reserve, and acquisitions systems implemented.
1984	* Additional enhancements to acquisitions, online public access catalog, and notices. Received software for inventory function and touch terminal.
1985	* New Public Access Catalog implemented.

(17)

DESIGNING POINT-OF-USE INSTRUCTION FOR THE ONLINE CATALOG

Studies currently being done on the online public access catalog (OPAC) indicate that a large percentage of users learn how to use the catalog by referring to point-of-use instructions. Because of the dominant use of this kind of tool and its low cost relative to other kinds of instruction, it is important to design these instructions for maximum effectiveness.

What are the characteristics of effective point-of-use materials? The findings of the CRL-sponsored OCLC studies of OPACS indicate that patrons found most helpful printed aids that were short and to the point (*A Comprehensive Study of Online Public Access Catalogs: An Overview and Application of Findings*, by Neal K. Kaske and Nancy P. Sanders, vol. 3, p. 57). It is common sense to recognize that most persons who use online catalogs for the first time have as their goal finding information and not learning how to find information. No one wants to read a book in order to find a book. Two good questions to ask, then, are first, what message needs to be relayed, and second, what is the shortest possible way to get this message across?

Perhaps more important than brevity itself is the illusion of brevity. This is accomplished through clever choice of format and layout. Do not crowd information into every inch of space available. This gives the learner the impression that there is too much to learn in one session at the terminal. It is far better to have a multi-page manual with only a few simple instructions per page. A flip-chart is a good way to present this kind of information for it presents an immediately visible index and encourages users to go directly to the infromation they need. In addition, it provides enough space so pages can remain uncluttered.

Simplicity is as important as brevity. Instead of writing paragraphs (or even sentences), break down instructions into straightforward statements or sections. Numbering statements so they are perceived as steps toward a goal is a good idea. For example:

TITLE SEARCH:

1. Enter: T/and the title

   EXAMPLE: T/SUN ALSO RISES

2. Press: RETURN KEY

Tips:
1. Do not space after the slash (/).
2. Omit any leading articles such as The, A, An, La, L', Der.
3. Be sure to space between words.

The physical characteristics of printed aids need to be tailored to particular situations. Are they to be portable or attached to the terminal station? What size is most appropriate for the space available? The durability of the materials from which the printed aids are constructed is usually linked to the cost factor. If heavy usage is expected, more expensive construction materials and methods may pay off in the long run.

A little humor never hurts, but unless ingeniously done it does usually take up additional space on the printed page. Also keep in mind that any humor must be integrated with the content so it doesn't detract from the message. And remember what

Designing Point-of-Use...(continued)

Marshall McLuhan said: the medium is the message. Any good point-of-use instruction must sell the online catalog as will as instruct in its use. An effective teaching tool at the terminal is one that convinces the user how easy and rewarding the online catalog is to use.

--Linda Wilson
Project Manager for User Education
Virginia Tech Libraries

BIB BITS

The Spring 1984 issue of *Improving College and University Teaching* (vol. 12) includes an article by Bruce E. Fleury, science librarian at Tulane University in New Orleans, entitled "Lectures, Textbooks and the College Librarian." Fleury maintains that "In order to qualify as equal partners in the process of education we (college librarians) must first demonstrate that we are an essential part of that process." He describes the shortcomings of the lecture-textbook style of teaching and advocates more independent study. Fleury suggests courses in library use for faculty in order to increse their awareness of the potential for bibliographic instruction. He urges a reduction in reserve reading lists and an increase in course-integrated library instruction. While his points are not new, their appearance in a journal aimed not only at librarians but at teaching faculty may have some effect.

--Deborah Fink
University of Colorado, Boulder

In "Trivializing Your Library" (*College and Research Libraries News*, July/August 1984, p. 341), Bonnie Gratch describes a BI promotion campaign at Bowling Green State University which uses trivia questions printed on table tents placed in the dining halls, ending with a twenty-question trivia contest.

NEW PERIODICAL FOR SCHOOL LIBRARIANS

In September 1984, the *School Library Media Activities Monthly* will begin appearing ten times a year to "provide useful, practical activities and information for elementary and middle/junior high school library media specialists." The producer/publishers, Paula K. Montgomery and H. Thomas Walker (authors of *Teaching Library Media Skills*, 1983) would like to encourage library media specialists to share those activities which have been successful in instructing students in essential library media and research skills. In addition to a "Sharing Ideas" section, each issue will have a daily almanac, listing dates and special events around which suggested library skill activities can be built; six to eight detailed activities in lesson-plan format with reproducible teaching aids; practical monthly columns containing reviews, bibliographies, and summaries of current research; and feature articles. The subscription rate is $40 a year, from LMS Associates, 17 East Henrietta Street, Baltimore, MD 21230.

BI POSTER SESSIONS

These poster sessions on BI were presented at the 1984 ALA Conference in Dallas. Contact the authors for more info; time permitting, they will be happy to share their experiences with you.

"An Integrated Academic Library Education Program"--Christine Graham, San Francisco State University, San Francisco, CA.

"A Teachable Research Process for Secondary Students"--Barbara Stripling and Judy Pitts, Fayetteville High School, Fayetteville, AR.

"Term Paper Advisory Service"--Jamie Wright Coniglio, Janice A. Fryer, and Eleanor R. Mathews, Iowa State University, Ames, IA.

"Individualized Term Paper Assistance: Programming Hints"--Kathleen Bergen and Barbara Macadam, University of Michigan, Ann Arbor, MI.

"Sophomore Orientation: An Introduction to Research"--Barbara Stripling and Judy Pitts, Fayetteville High School Library, Fayetteville, AR.

University of Wisconsin-Oshkosh
Curriculum Development Grant
May 1, 1985

INSTRUCTION FOR THE ONLINE CATALOG

1. Assume a patron approaches the terminal for the first time. Estimate how long it takes to teach the average patron to do a basic search: _____

2. Assume a patron has done a basic search. Estimate how long it takes to teach the average patron the more sophisticated capabilities of the online catalog: _____

3. For each type of patron, please rank the various teaching techniques: 1-Best, 5-Worst.

	Graduate Students	Under-graduates	Faculty	Library Staff
HANDOUTS				
GROUPS				
ONE-TO-ONE				
HELP SCREEN				
OTHER-Please specify:				

4. What publicity concerning the online catalog did you use before going online? after going online? would you recommend to us?

	USED BEFORE	USED AFTER	WOULD RECOMMEND
Radio-TV			
News Releases			
Posters			
Slide Tapes			
Video Tapes			
Presentations			
Vendor Demos.			
Other (Please specify.)			

_____
_____

5. What were (are) your major problems with training patrons?

6. What are your favorite successes and innovations?

7. Have you come up with a method to deal with the 'screen privacy' concern? If so, please describe.

8. Name or type of your Online System: _____
When was your system operational? _____

9. Approximate number of titles in your online catalog:
_____

10. Please indicate the number of students and faculty at your institution:

Students			Faculty		
	0-1000	___		0-99	___
	1000-4999	___		100-499	___
	5000-9999	___		500-999	___
	10000-19999	___		1000-1999	___
	20000-	___		2000-	___

Please send copies of, or descriptions of, any handouts, publicity materials, training aids, timetables for instruction, checklists, signs, etc.

Please return this form and any material to:

Douglas Campbell
Polk Library
University of Wisconsin-Oshkosh
Oshkosh, WI 54901

Thank you for your assistance.

INDEX TO FILE OF SAMPLE MATERIALS

Sample library instruction materials are available from the following institutions:

Bowling Green State University
Carnegie-Mellon University
Illinois State University
Indiana State University
Iowa City Public Library
Lansing Community College
LOEX Workshop Handouts
Mankato State University (MN)
Marshall University (WV)
Miscellanous
Northwestern University (IL)
Ohio State University
Pasedena City College
Pennsylvania State University
St. Cloud State University (MN)
Syracuse University (NY)
Tarrant County Junior College (TX)
University of California--Santa Barbara
University of Cincinnati
University of Florida
University of Houston
University of Illinois--Urbana
University of Maryland--College Park
University of Tennessee
University of Texas at Austin
University of Wisconsin--Madison
University of Wisconsin--Stout
Winona State University (MN)

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